Creating and Viewing Case Notes

Note: In order to create a case note, an assignment to the case is not needed. Additionally, a case note can be created on a closed case.

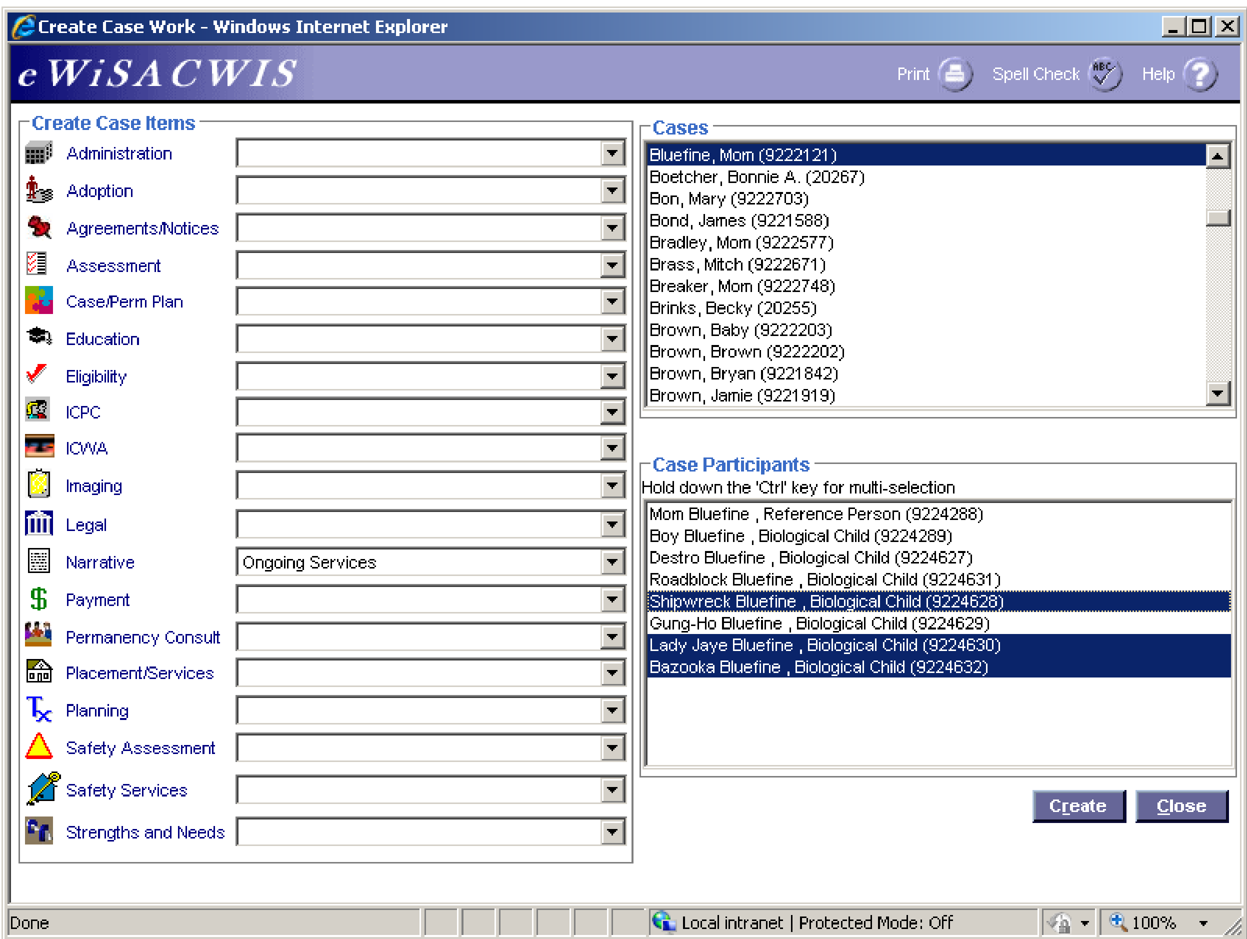
Creating Case Notes on Assigned Cases

1. Create a case note using one of two methods:

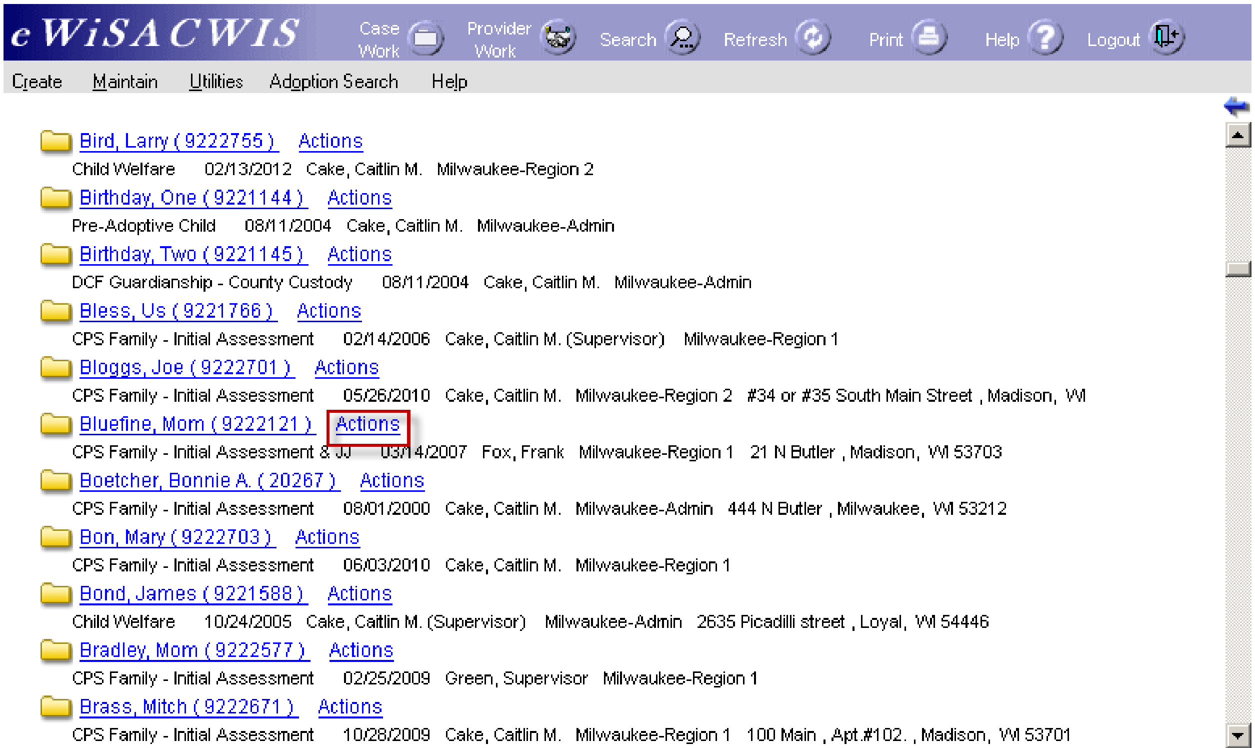
    a) From your desktop, click the Case Work hot button 

. This will open the Create Case Work page.

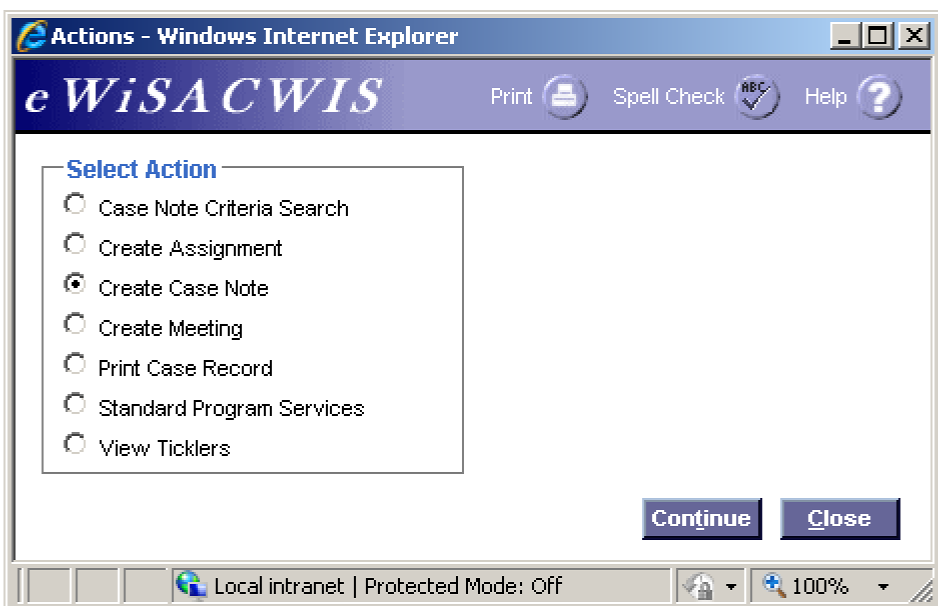
    Select the Category from the Narrative drop-down and select the Case. The selection of case participants is optional; use the ‘ctrl’ key to select more than one participant. Click Create. This will open the Case Notes page.



b) From your desktop, click the Actions hyperlink next to your case. This will open the Actions page.



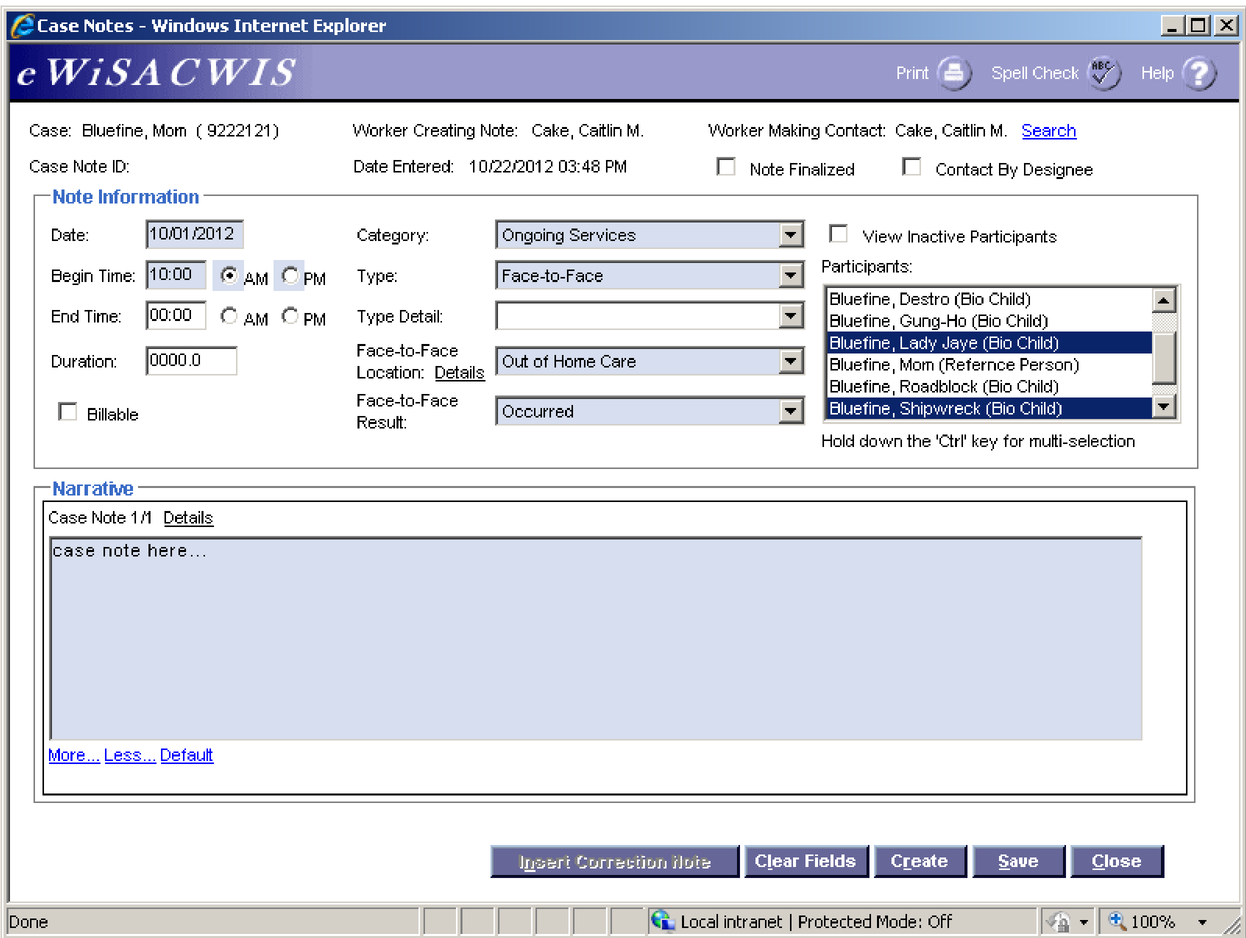
On the Actions page, select Create Case Note and click Continue. This will open the Case Notes page.



2. On the Case Notes page, there is an option to search out the Worker Making Contact if it is not you (the person creating the case note). Click the Search hyperlink to search the worker making contact. Enter the Date, Type, Face-to-Face Location (if applicable), Face-to-Face Result (if applicable), and the Narrative. The case note can be saved and updated for up to 30 days after it is created. When the Note Finalized checkbox is checked or 30 days have passed, the note will be frozen and no longer editable. Click Save to save your changes. The Create button creates a new Case Note for the same case. The Clear Fields button will blank out all of the fields on this note. For the Insert Correction Note button, see the associated Creating Correction Notes Quick Reference Guide.

   Note: Per policy agencies may use other professional staff as designees to complete face-to-face contacts. Staff includes those trained to assess safety, facilitate permanence, ensure a child's well-being, and evaluate the progress of a child and family's case. To indicate a Case Note completed by a designee, select the Contact by Designee checkbox.

   Note: The View Inactive Participants checkbox can be selected. This will display all other participants in the case that may be inactive (due to TPR, Subsidized Guardianship, etc.).

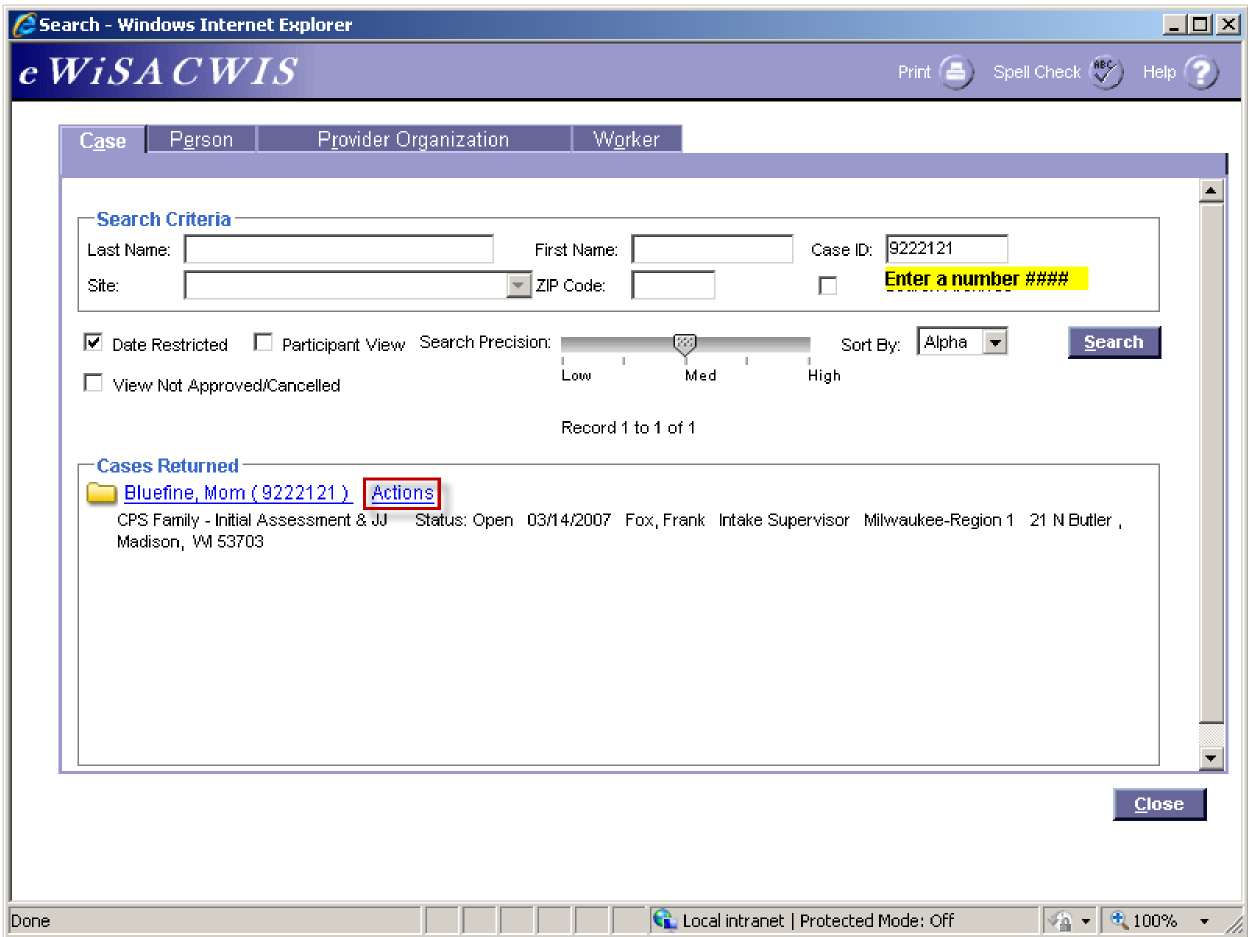


Creating Case Notes from Search (with or without an assignment to the case)

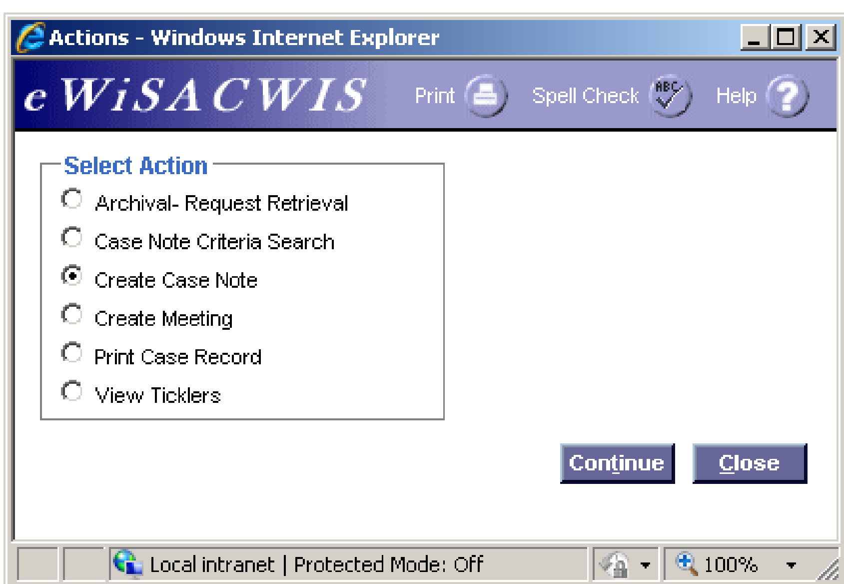
1. From your desktop, click the Search hot button 

. This will open the Search page.

2. On the Search page, search the case to add a case note to. You do not need to be assigned to the case, and the case can be open or closed. Click the Actions hyperlink next to the case name.



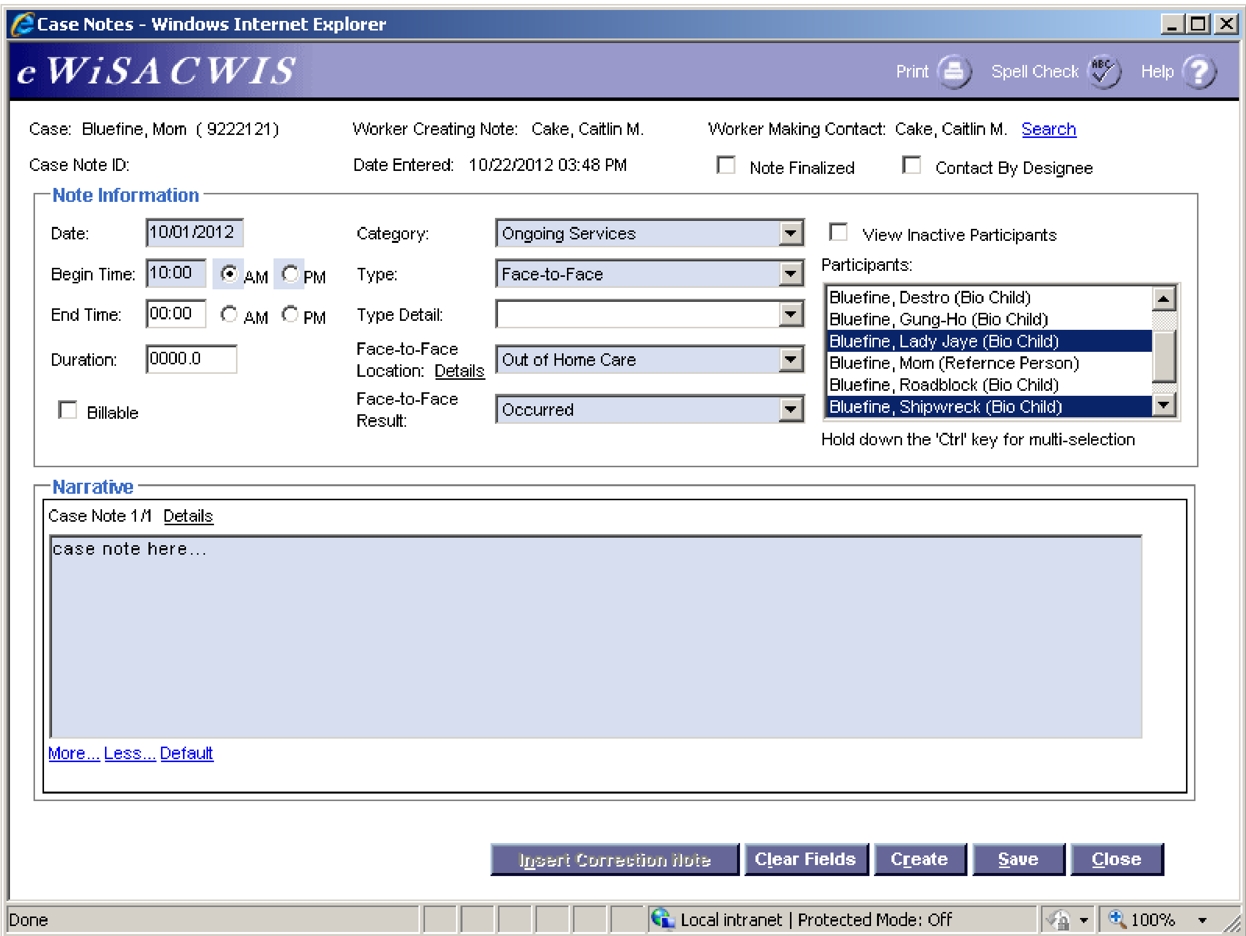
3. Select the Create Case Note radio button and click Continue. This will open the Case Notes page.



4. Complete the required fields and click the Save button when finished.

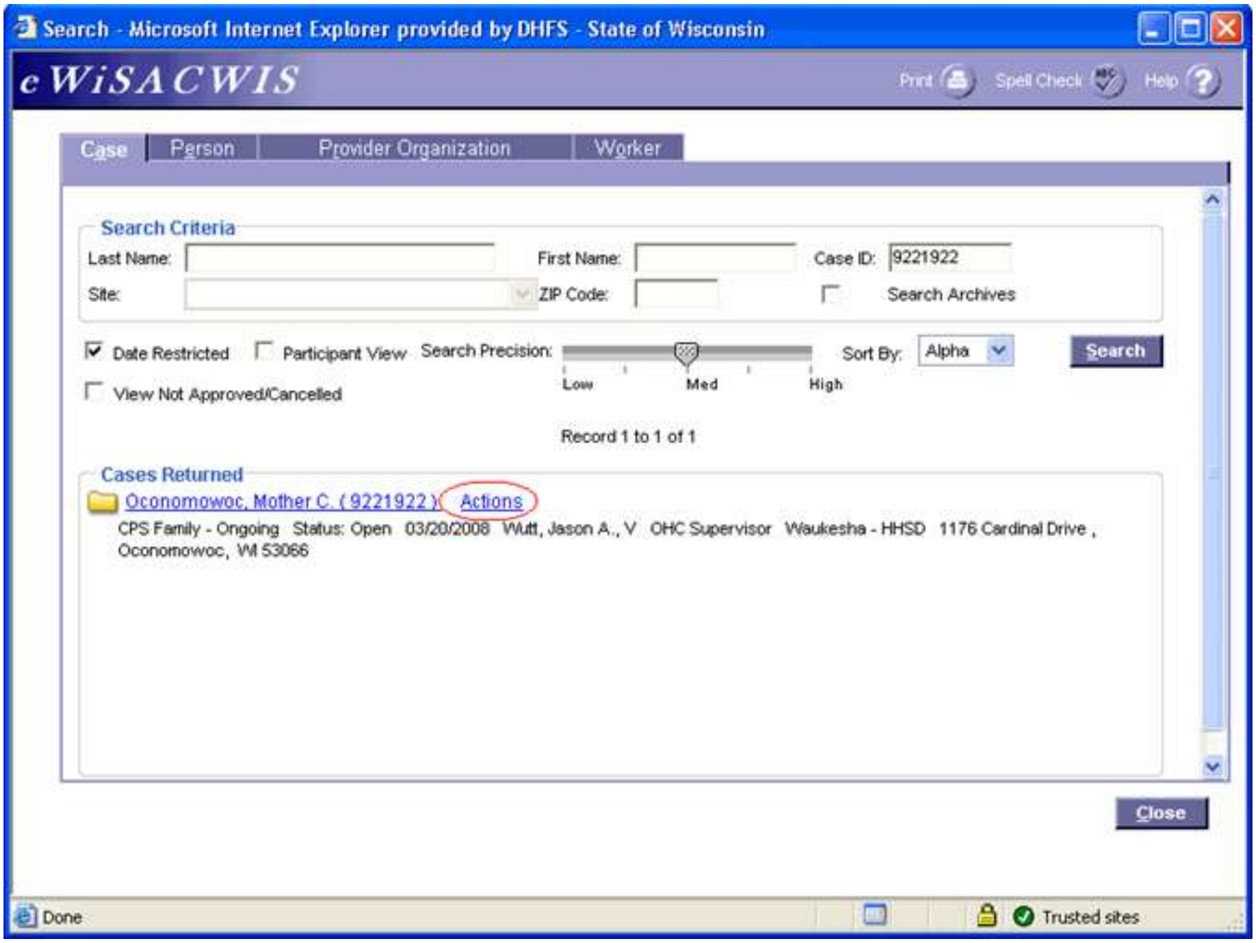
Note: The case note can be edited up until the note is finalized (30 days after the note was created) by either the worker creating the note or the worker making contact.

Note: Per policy agencies may use other professional staff as designees to complete face-to-face contacts. Staff includes those trained to assess safety, facilitate permanence, ensure a child's well-being, and evaluate the progress of a child and family's case. To indicate a Case Note completed by a designee, select the Contact by Designee checkbox.

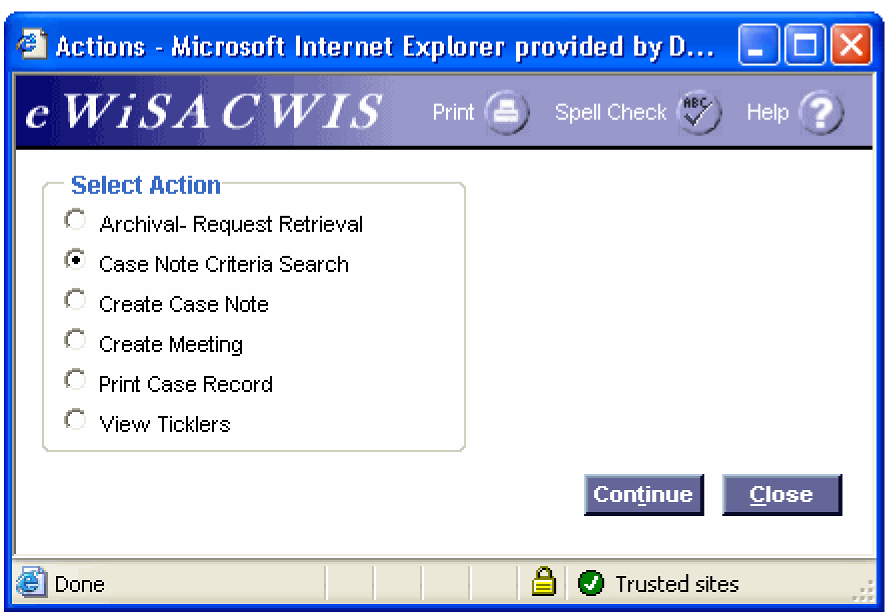


Viewing Case Notes

1. To view or print multiple notes for a case at one time, from your desktop or from search, click the Actions hyperlink next to the case name. This will open the Actions page.

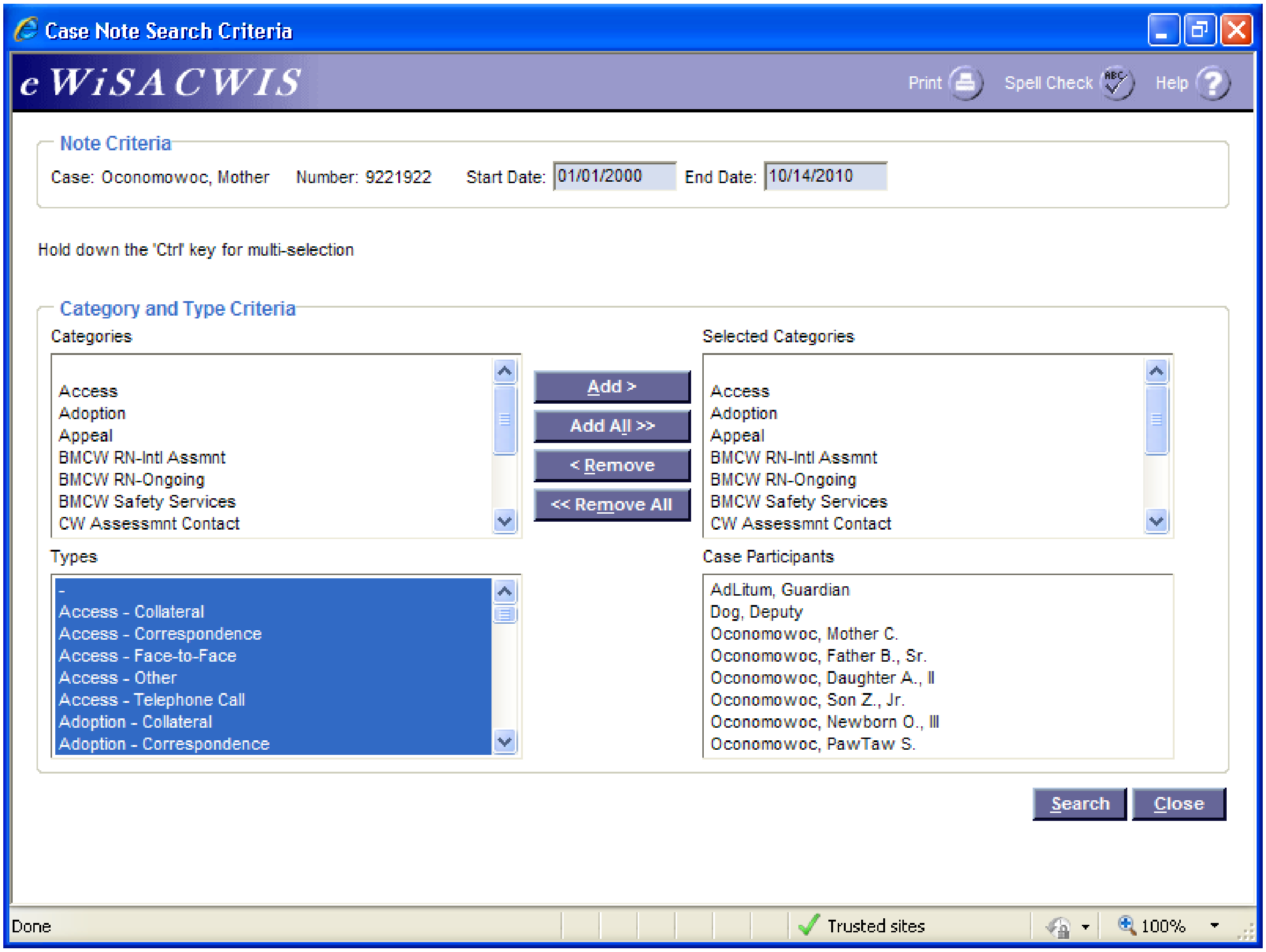


2. On the Actions page, select the Case Note Criteria Search radio button and click Continue.

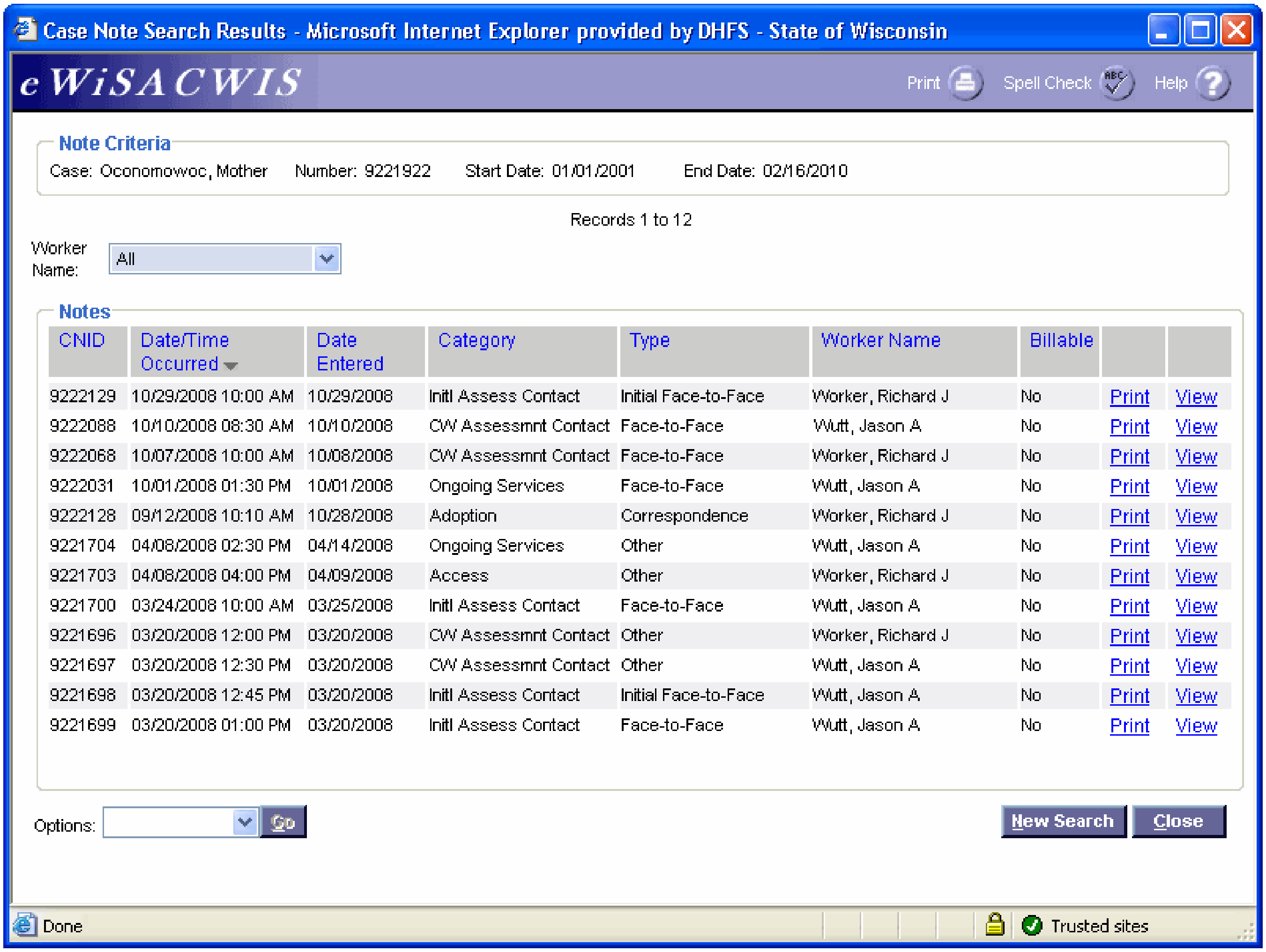


3. Enter the criteria for the notes to be viewed. Start Date, End Date, and at least one Category are required. Once all desired criteria are entered, click the Search button.

   Note: The Start Date and End Date pre-fill to retrieve the past 30 days' worth of notes. These dates can be changed to retrieve a greater or lesser timeframe.



4. The notes returned can be sorted different ways by clicking the blue column labels like Date Entered, Category, Type, etc. To show notes only for a particular worker, select that worker from the Worker Name drop down. To Print or View one case note, select the appropriate link on the right. To view all these notes at once and have the ability to print these notes, select Print All Notes from the Options drop-down and click 'Go.' This will open the notes in a Microsoft Word document.


Case Note Search Results - Microsoft Internet Explorer provided by DHFS - State of Wisconsin

eWiSACWIS Print Spell Check Help

Note Criteria

Case: Oconomowoc, Mother Number: 9221922 Start Date: 01/01/2001 End Date: 02/16/2010

Records 1 to 12

Worker Name: All

Notes

CNID	Date/Time Occurred	Date Entered	Category	Type	Worker Name	Billable		
9222129	10/29/2008 10:00 AM	10/29/2008	Initl Assess Contact	Initial Face-to-Face	Worker, Richard J	No	Print	View
9222088	10/10/2008 08:30 AM	10/10/2008	CW Assessmnt Contact	Face-to-Face	Wutt, Jason A	No	Print	View
9222068	10/07/2008 10:00 AM	10/08/2008	CW Assessmnt Contact	Face-to-Face	Worker, Richard J	No	Print	View
9222031	10/01/2008 01:30 PM	10/01/2008	Ongoing Services	Face-to-Face	Wutt, Jason A	No	Print	View
9222128	09/12/2008 10:10 AM	10/28/2008	Adoption	Correspondence	Worker, Richard J	No	Print	View
9221704	04/08/2008 02:30 PM	04/14/2008	Ongoing Services	Other	Wutt, Jason A	No	Print	View
9221703	04/08/2008 04:00 PM	04/09/2008	Access	Other	Worker, Richard J	No	Print	View
9221700	03/24/2008 10:00 AM	03/25/2008	Initl Assess Contact	Face-to-Face	Wutt, Jason A	No	Print	View
9221696	03/20/2008 12:00 PM	03/20/2008	CW Assessmnt Contact	Other	Worker, Richard J	No	Print	View
9221697	03/20/2008 12:30 PM	03/20/2008	CW Assessmnt Contact	Other	Wutt, Jason A	No	Print	View
9221698	03/20/2008 12:45 PM	03/20/2008	Initl Assess Contact	Initial Face-to-Face	Wutt, Jason A	No	Print	View
9221699	03/20/2008 01:00 PM	03/20/2008	Initl Assess Contact	Face-to-Face	Wutt, Jason A	No	Print	View

Options: Go New Search Close

Done Trusted sites

Quick View of Case Notes from the Desktop

From your desktop (or from case search), expand the case, expand the narrative icon, and then put your mouse cursor over the word (Details) to see the first 120 characters of that case note. To view the entire note, click the hyperlink.